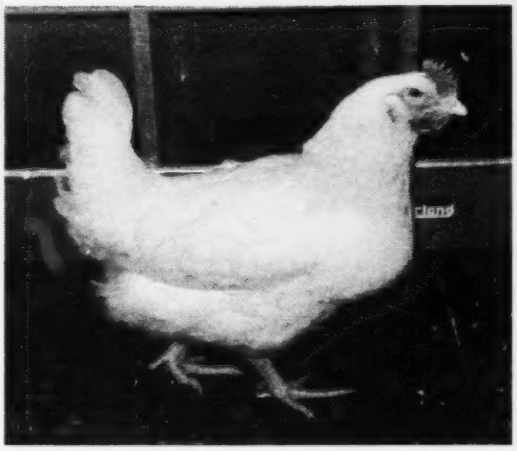
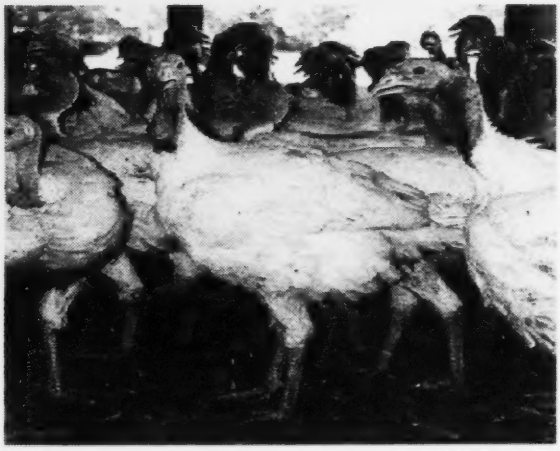
2000

Manitoba Poultry Industry Profiles





Manitoba

Building for the Future

103-04827/

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- BROILER CHICKEN SECTOR 7-12

- TURKEY SECTOR 13-18

Sources:
Agriculture and Agri-Food Canada
Canadian Egg Marketing Agency
Canadian Turkey Marketing Agency
Chicken Farmers of Canada
Manitoba Agriculture and Food
Manitoba Chicken Producers
Manitoba Egg Producers
Manitoba Turkey Producers
Statistics Canada

For further information, please contact either Manitoba Chicken Producers, Manitoba Egg Producers or Manitoba Turkey Producers or:

Janet Honey, Manager
Market Analysis & Statistics Section
Program and Policy Analysis Branch

Phone: (204) 945-2364
Fax: (204) 948-2844
e-mail: jhoney@gov.mb.ca

May 2003

EGG SECTOR

EGG SECTOR PROFILE

Production:

Egg production is concentrated in south-eastern Manitoba, with about three-quarters of production taking place within an 80-km radius of Winnipeg. The industry includes hatcheries, started pullets, feed production, egg production, graders and further processors. There is a high degree of organization, co-operation and co-ordination from hatchery through to egg processing.

Three provincial hatcheries set 18.1 million eggs in 2002 and hatched over 14.4 million chicks. About 3.1 million pullet chicks were placed in Manitoba pullet operations, while about 3.9 million were sold out-of-province. In 2002, there were 172 registered egg producers with almost 2.2 million layers producing under regular quota, 0.5 million layers under special market development quota and 0.26 million layers under Eggs for Processing quota. About 300 unregistered producers (permitted to have 100-499 layers) had a total of 90,000-100,000 layers.

Marketings and Trade:

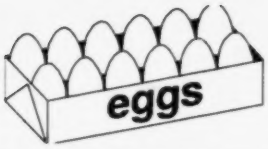
Manitoba commercial egg marketings in 2002 (regular quota - registered and unregistered production) rose by 4.6 percent to 54.75 million dozen valued at over $82 million. The prices Manitoba producers receive for their eggs are determined in part by a formula based on the average cost of production over a given time period. Three commercial grading stations and 36 registered farmer graders in the province graded 51.68 million dozen eggs in 2002. About 69 percent of all graded eggs were A Large, X-Large and Jumbo. Registered producers marketed about 3.07 million dozen eggs privately. Eggs produced under special market development quota totalled 11.55 million dozen and there were 5.35 million dozen eggs produced under the Eggs for Processing program. These eggs were valued at about $8 million. Of total Manitoba egg marketings (excluding hatching eggs), 39.3 million dozen went to local processors and 1.43 million dozen to processors in the rest of Canada. About 30.92 million dozen were retailed as table eggs to consumers in Manitoba and other provinces. About 4.86 million dozen eggs were brought into the province for use by Manitoba processors.

Processing:

The Eggs for Processing program allows local egg producers to expand their flocks in order to provide eggs under contract to Manitoba processors to supply growing processed market requirements. This additional Manitoba production replaces most of the eggs that were being imported from the United States by Canadian Inovatech Inc., the largest egg processor in Canada. Canadian Inovatech and the other major Manitoba egg processor, Burnbrae Farms Ltd., produce many innovative, value-added products for the food and pharmaceutical industries. The egg processors continue to develop numerous products from egg white, yolk and shell. These two operations exported egg products valued at about $21.5 million in 2002.

Potential:

Manitoba's egg industry has the potential to expand by supplying more eggs for processing market growth. Manitoba egg producers are among the most efficient, quality-conscious producers in Canada and have a competitive advantage over many other areas.



EGG SECTOR

	1999	2000	2001	2002	'02 as a % of '01
EGG PRODUCTION OPERATIONS:	180	177	174	172	99
LAYERS ON FARMS JULY 1 ('000):					
Hens (incl. unregistered)	2,465	3,064	3,085	3,075	100
Hens (quota - regular)	2,128	2,151	2,198	2,199	100
Hens (quota - special market dev.)		818	800	778	97
PROVINCIAL HATCHERIES:					
Hatcheries (No.)	3	3	3	3	100
Eggs Set (million)	15.6	16.6	18.5	18.1	98
All Chicks Hatched (million)	12.8	12.6	14.6	14.4	98
Pullet Chicks Placed in Mb (million)	3.31	3.20	3.31	3.07	93
HATCHERY SUPPLY BREED. STOCK:					
Flocks	15	11	15	8	53
Hens ('000)	93.3	87.1	114.6	99.0	86
PULLET GROWING OPERATIONS:					
Commercial	14	14	14	14	100
Other	85	85	84	78	93
Pullets Sold (million)	2.3	3.1	3.2	3.1	97
FARM VALUE OF SALES ($ million):	**53.0**	**72.1**	**72.9**	**82.4**	**113**
Eggs for Hatching	0.6	0.5	0.4	0.3	75
Eggs for Consumption	52.4	71.6	72.5	82.1	113
EGG PRICES (cents/dozen):					
Average All Grades (before levies)	115.2	120.1	124.0	134.5	108
Average Grade A Large	124.2	128.9	135.7	144.9	107
EGG MARKETINGS (million dozen):					
Graded (registered)	48.36	49.78	49.09	50.36	103
Graded (unregistered)	0.72	0.78	0.99	1.32	133
Off-farm Private Sales	2.45	2.31	2.25	3.07	136
Commercial Marketings-regular	**51.53**	**52.87**	**52.33**	**54.75**	**105**
Eggs for Processing and Special Market Development	**0.00**	**18.40**	**17.00**	**16.90**	**99**
EGG GRADING ('000):					
No. of Commercial Grading Stations	3	3	3	3	100
No. of Farmer Graders	36	36	36	36	100
EXPORTS OF EGGS/EGG PRODUCTS:					
Value of Hatching Eggs ($ million)	0.23	0.53	0.36	0.02	6
Value of Eggs/Egg Products ($ million)	16.35	15.58	19.81	21.54	109
IMPORTS OF EGGS/EGG PRODUCTS:					
Value of Hatching Eggs ($ million)	0.66	0.79	0.93		
Value of Eggs/Egg Products ($ million)	6.42	3.34	4.94	4.04	82
CDN. PER CAPITA CONSUMPTION:					
Eggs (incl. product) (dozen fresh equiv)	15.3	15.7	16.0		

EGG INDUSTRY CHART, 2002

HATCHERY SUPPLY
BREEDING FLOCKS: 8
HENS: 99,000

PROVINCIAL HATCHERIES
3 YEAR ROUND
EGGS SET: 18.1 M
CHICKS HATCHED: 14.4 M
PULLET CHICKS:
PLACED IN MB: 3.1 M
NET OTHER SALES: 3.9 M

INTERPROVINCIAL OUT:
HATCHING EGGS: 559,862
PULLETS/CHICKS:1,796,166

EXPORTS TO U. S.:
HATCHING EGGS: 0
PULLET CHICKS: 2,515,000

PULLET OPERATIONS:
14 (COMM.) 78 (OTHER)
PULLETS SOLD: 3.1 M

INTERPROVINCIAL IN:
HATCHING EGGS: 106,920
PULLET CHICKS: 40,322

IMPORTS FROM U. S.:
HATCHING EGGS: 605,000
PULLET CHICKS: 371,000

EGG PRODUCTION OPERATIONS:
REGISTERED PRODUCERS: 172
Quota Layers: 2.2 M
Eggs for Processing Layers: 0.26 M
Spec. Market Develop. Layers: 0.52 M
EGGS PRODUCED (dozen): 71.65 M
TOTAL V ALUE OF EGGS: $82.1 M

ANNUAL FEED REQUIRED:
$30 million

ANNUAL CAPITAL AND OPERATING EXPENDITURES:
$47 million (excl. levies)

PRIVATE SALES:
3.07 M dozen

GRADERS:
25.65 M dozen

REGISTERED GRADING STATIONS:
EGGS GRADED: 51.68 M dozen
COMMERCIAL GRADERS: 3
FARMER GRADERS: 36

MANITOBA EGG PRODUCERS
- SETS PRICE
- ALLOCATES QUOTA
- AGENT FOR CEMA'S INDUST. PROD. PROG.

TABLE MARKETS:
CEMA 2.20 M dozen
OTHER: 28.72M dozen

CANADIAN EGG MARKETING AGENCY
Industrial Product Program: 26.03 M doz
Special Market Dev. Quota: 11.55 M doz
Eggs for Processing: 5.35 M doz

PROCESS MARKETS:
Reg. Quota 23.83 M doz
Special Mkt: 11.55 M doz
Eggs for Proc.: 5.35 M doz

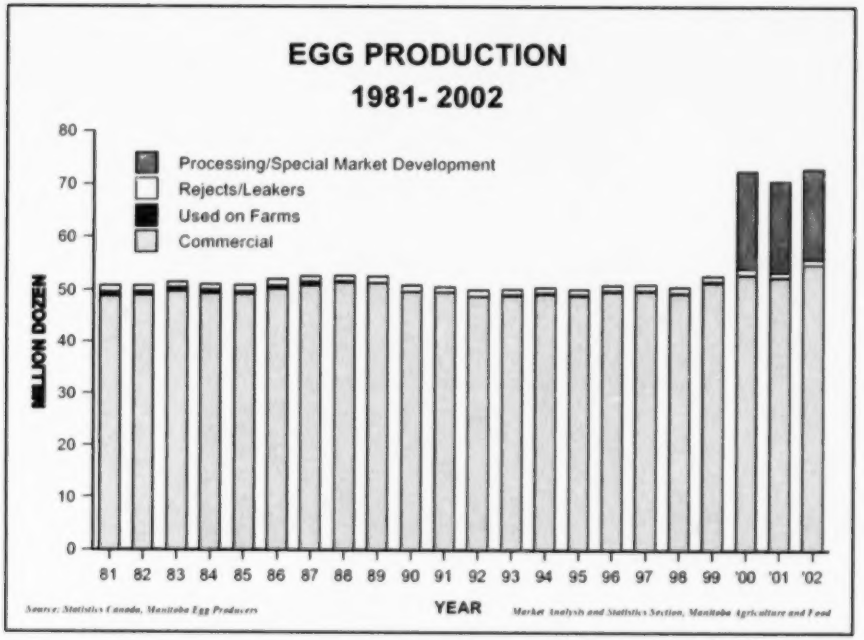
OTHER PROVINCES:
PROCESSORS: 1.43 M dozen
EGG PRODUCTS: N/A

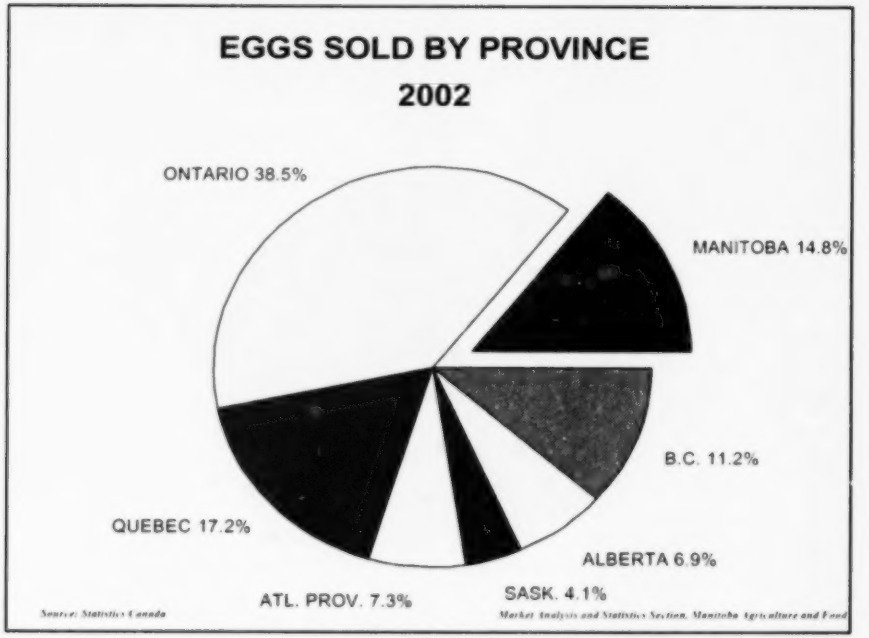
MANITOBA EGG PROCESSORS:
2
EMPLOYEES: 112
EGGS :
Manitoba: 39.3 M dozen
Non-Mb: 4.86 M dozen

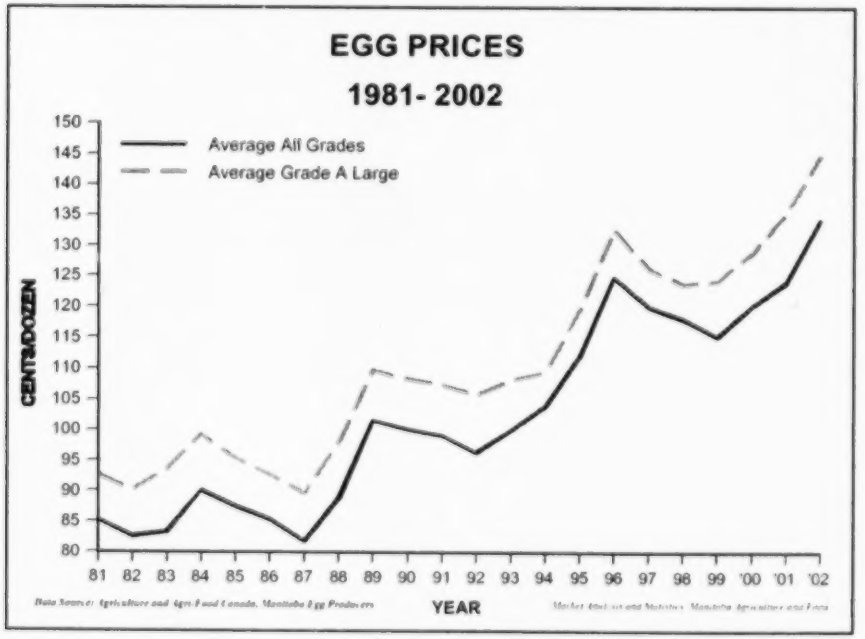
CANADIAN TABLE EGG MARKETS
MB. EGGS: 30.92 M dozen

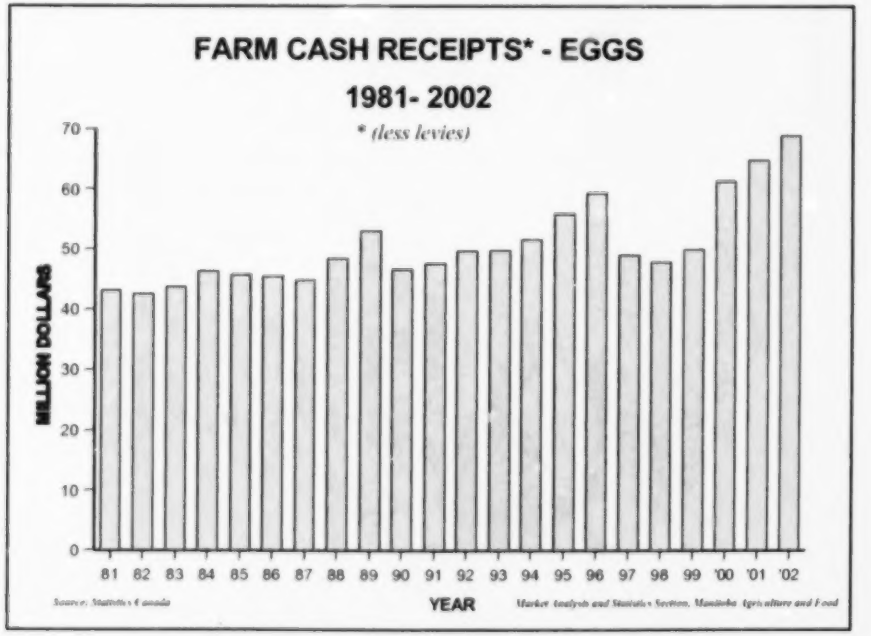
EXPORTS:
EGG PRODUCTS:
4,467 tonnes valued at $21.5 M

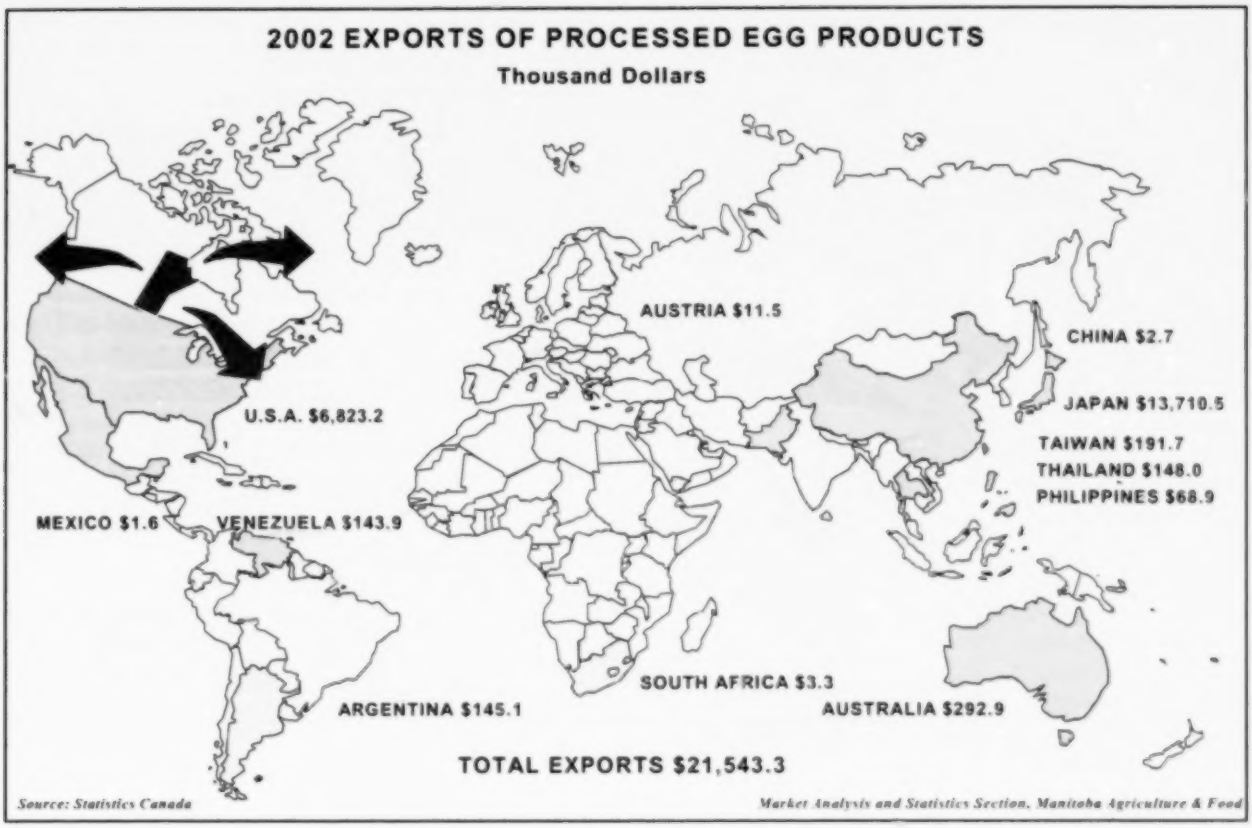
DATA SOURCE: Manitoba Egg Producers, Agriculture and Agri-Food Canada, Statistics Canada.


EGG PRODUCTION
1981- 2002
Processing/Special Market Development
Rejects/Leakers
Used on Farms
Commercial
MILLION DOZEN
0
10
20
30
40
50
60
70
80
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01 '02
YEAR
Source: Statistics Canada, Manitoba Egg Producers
Market Analysis and Statistics Section, Manitoba Agriculture and Food


EGGS SOLD BY PROVINCE
2002
ONTARIO 38.5%
MANITOBA 14.8%
B.C. 11.2%
ALBERTA 6.9%
SASK. 4.1%
ATL. PROV. 7.3%
QUEBEC 17.2%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

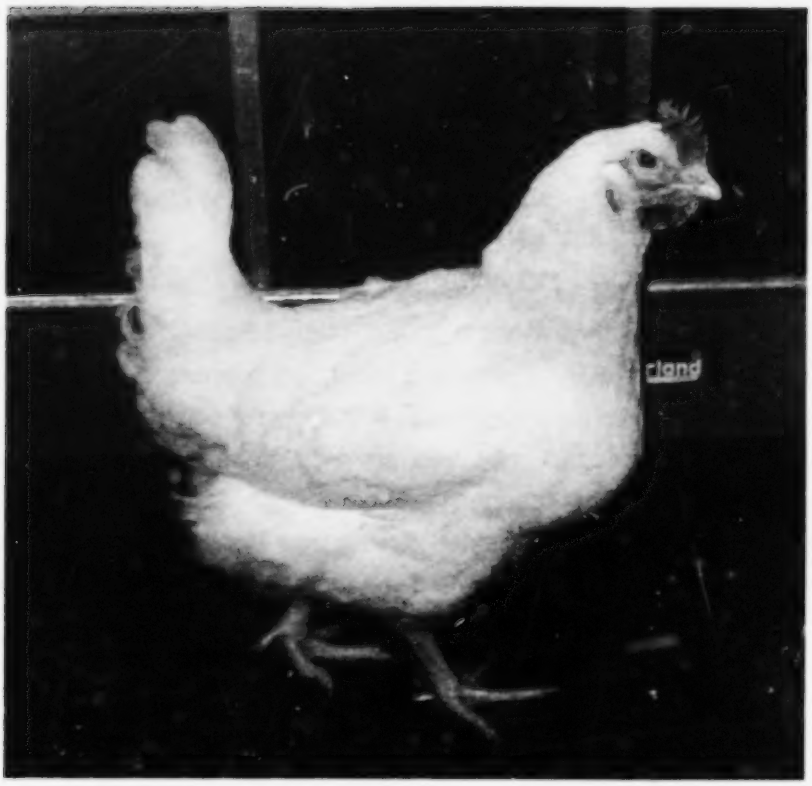

EGG PRICES
1981- 2002
Average All Grades
Average Grade A Large
CENTS/DOZEN
80
85
90
95
100
105
110
115
120
125
130
135
140
145
150
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01 '02
YEAR
Data Source: Agriculture and Agri-Food Canada, Manitoba Egg Producers


FARM CASH RECEIPTS* - EGGS
1981- 2002
* (less levies)
MILLION DOLLARS
0
10
20
30
40
50
60
70
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01 '02
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 EXPORTS OF PROCESSED EGG PRODUCTS
Thousand Dollars
AUSTRIA $11.5
CHINA $2.7
JAPAN $13,710.5
TAIWAN $191.7
THAILAND $148.0
PHILIPPINES $68.9
U.S.A. $6,823.2
MEXICO $1.6
VENEZUELA $143.9
ARGENTINA $145.1
SOUTH AFRICA $3.3
AUSTRALIA $292.9
TOTAL EXPORTS $21,543.3
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

2002 IMPORTS OF PROCESSED EGG PRODUCTS
Thousand Dollars
U.S.A. $4,035.4
TOTAL IMPORTS $4,035.4
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

BROILER CHICKEN SECTOR



BROILER CHICKEN SECTOR PROFILE

Production:

Most broiler chicken farms are located in the south-eastern corner of the province. Chickens are raised indoors where they are protected from the weather and predators and where they have the freedom to move, eat and drink at will. There were 124 registered broiler chicken producers in Manitoba with about 3.65 million birds on farms in July 2002. The size of farms ranges from about 120,000 chickens produced per year to 1.5 million chickens produced. Any non-registered chicken production marketed through a federally or provincially-inspected plant is limited to 999 birds per producer and must be covered by an exemption permit. In addition, there were about 0.2 million broiler chickens on 600 other farms in the province, most of which were destined for on-farm consumption. Four year-round and one seasonal hatchery supplied the industry in Manitoba with 30.0 million chicks in 2002. Over 36.9 million hatching eggs were obtained by the hatcheries from 39 local hatchery supply breeding flocks as well as from other provinces and the United States.

Marketings:

Sales of registered broiler chickens decreased by 3.4 percent to more than 26.7 million chickens in 2002, of which almost all weighed between 1.2 and 2.6 kilograms (live weight). There was also non-registered production of only 55,000 chickens, most of which were roasters (over 2.6 kilograms live weight). Most of the non-registered chickens are slaughtered on a custom-kill basis. Total Manitoba broiler chicken sales fell by 3.4 percent to almost 26.8 million chickens valued at close to $61 million.

Processing and Trade:

There were two plants in Manitoba, which slaughtered and processed the majority of the registered chickens marketed in the province in 2002, Granny's Poultry Co-operative (Man) Ltd. and Dunn-Rite Food Products, Ltd., as well as one secondary processor, Prairie Produce, Inc. The 38.8 million kg of eviscerated chicken processed in 2002, valued at an estimated $89 million, was down by 0.3 percent from the 2001 level. Inter-provincial trade in chicken involves the sale of whole chickens, chicken parts and "canners". About 2.7 million kg of chicken and chicken products, valued at $11.3 million, was imported directly into Manitoba from the U.S. in 2002 mainly for sale through a major retail chain. Manitoba exported 1.44 million kg of chicken and chicken products valued at $0.93 million in 2002, half the 2001 volume.

Potential:

There is room for growth in Manitoba's broiler chicken industry for the domestic market due to supply management under the National Allocation and Pricing Agreement. Each province is allowed to increase its chicken production by a maximum of 8 percent over the base in each period. There is also potential for growth to supply export markets. Prairie poultry producers generally have a competitive advantage over many other areas in Canada.

BROILER CHICKEN SECTOR

	1999	2000	2001[R]	2002[P]	'02 as a % of '01
REG. BROILER CHICKEN FARMS:	128	124	124	124	100
NO. OF BROILERS – JULY 1 ('000):	3,290	3,500	3,980	3,850	97
% of Canada	4.8	4.7	4.6	4.6	
PROVINCIAL HATCHERIES:					
Hatcheries (No.)	7	5	5	5	100
Eggs Set (million)	30.1	34.3	37.3	36.9	99
Chicks Hatched (million)	24.0	27.5	29.4	29.7	101
Chicks Sold (million)	25.6	28.9	31.0	30.0	97
HATCHERY SUPPLY BREEDING STOCK:					
Flocks	36	38	40	39	98
Hens ('000)	178.5	195.8	215.9	218.0	101
FARM CASH RECEIPTS ($ million):					
Hens and Chickens	56.0	56.7	63.3	61.2	97
% of Canada	4.2	4.2	4.2	4.2	
BROILER CHICKEN PRICES ($ each):					
Broilers (under 1.2 kg live)	1.35	1.29	1.44	1.34	93
Broilers (1.2-2.6 kg live)	2.20	2.11	2.30	2.24	97
Roasters (over 2.6 kg live)	4.00	4.20	4.50	4.00	89
CHICKEN MARKETINGS ('000 birds):	24,892	26,331	27,729	26,798	97
Registered marketings:	24,841	26,283	27,671	26,743	97
Broilers (under 1.2 kg live)	0	0	0	0	
Broilers (1.2-2.6 kg live)	24,822	26,277	27,657	26,727	97
Roasters (over 2.6 kg live)	19	6	14	16	114
Non-registered marketings:	51	48	58	55	95
CHICKEN PROCESSING ('000):					
Number of Slaughter Plants	2	2	2	2	100
Chicken Processed (million kg evis)	35.1	36.6	38.9	38.8	100
Value of Processed Chicken ($M)	86	90	91	89	98
EXPORTS OF CHICKEN/PRODUCT:					
Quantity (tonnes)	1,244.8	1,218.2	2,849.3	1,437.3	50
Value ($'000)	1,083.4	991.0	2,850.5	925.9	32
IMPORTS OF CHICKEN/PRODUCT:					
Quantity (tonnes)	2,398.8	1,551.6	2,103.6	2,695.3	128
Value ($'000)	9,777.8	6,839.6	9,795.6	11,349.5	116
CDN. PER CAPITA CONSUMPTION:					
Chicken (eviscerated kg)	27.8	28.9	29.5		

BROILER CHICKEN INDUSTRY CHART, 2002

HATCHERY SUPPLY
BREEDING STOCK ON FARMS
FLOCKS: 39
HENS: 218,000
HATCHING EGGS PLACED: 30.4 M

EXPORTS TO U.S.:
HATCHING EGGS: 0.0 M
CHICKS: 0.0 M

INTERPROVINCIAL OUT:
HATCHING EGGS: 0.27 M
CHICKS: 0.30 M

IMPORTS FROM U.S.:
HATCHING EGGS: 6.46 M
CHICKS: 0.29 M

INTERPROVINCIAL IN:
HATCHING EGGS: 0.04 M
CHICKS: 0.35 M

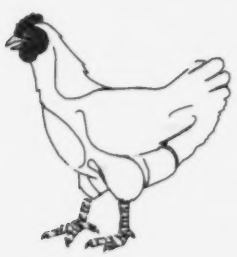
PROVINCIAL HATCHERIES
4 YEAR ROUND
1 SEASONAL
EGGS SET: 36.9 million
CHICKS HATCHED: 29.7 million
CHICKS PLACED: 30.0 million

ANNUAL FEED REQUIRED:
$27million

BROILER PRODUCTION
REGISTERED PRODUCERS :
MARKETINGS: 26.798 M birds
REGISTERED: 26.743 M birds
NON-REGISTERED: 0.055 M birds
TOTAL VALUE: $61 million

ANNUAL CAPITAL AND OPERATING EXPENDITURES:
$33 million

PRIVATE SALES:
55,000 birds



MANITOBA CHICKEN PRODUCERS
- NEGOTIATES PRICE
- REGULATES QUOTA

CHICKEN FARMERS OF CANADA
- SETS GLOBAL QUOTA

2 SLAUGHTER/PROCESS PLANTS
1 PROCESSING PLANT
EMPLOYEES: approx. 600
SLAUGHTER: 26.7 million birds
EVISC.WEIGHT: 38.8 million kg
WHOL. VALUE (est) $89 million

EXPORTS:
1.44 million kg
$0.93 million

INTERPROVINCIAL OUT:
Whole, parts, canners

INTERPROVINCIAL IN:
SASKATCHEWAN: 0 tonnes
ALBERTA: 0 tonnes

IMPORTS FROM U. S.:
2.70 million kg
$11.35 million

MANITOBA MARKET
FRESH AND FROZEN PRODUCT

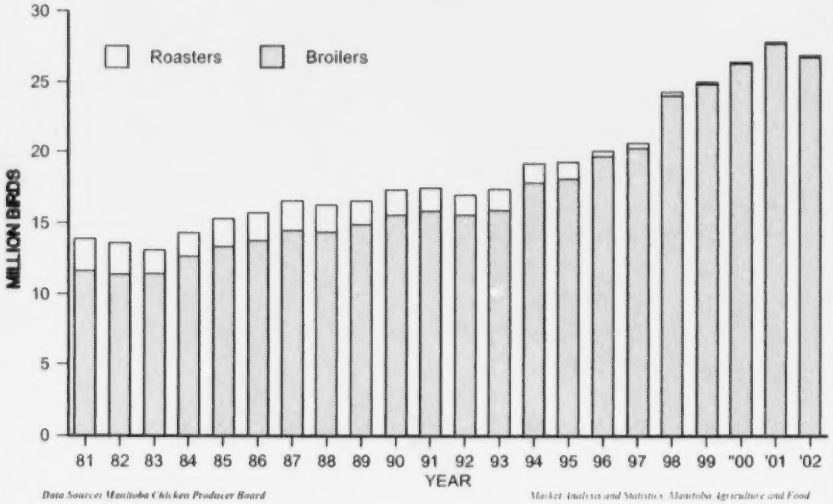
FAST FOOD & RESTAURANT

RETAIL STORES

FURTHER PROCESSING

DATA SOURCE: Agriculture and Agri-Food Canada, Manitoba Chicken Producers, Statistics Canada.

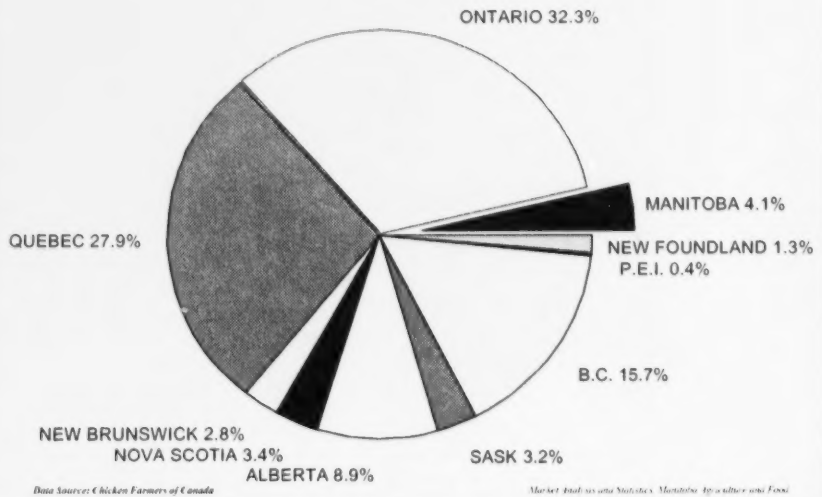
BROILER CHICKEN MARKETINGS
1981- 2002



Data Sources: Manitoba Chicken Producer Board

Market Analysis and Statistics, Manitoba Agriculture and Food

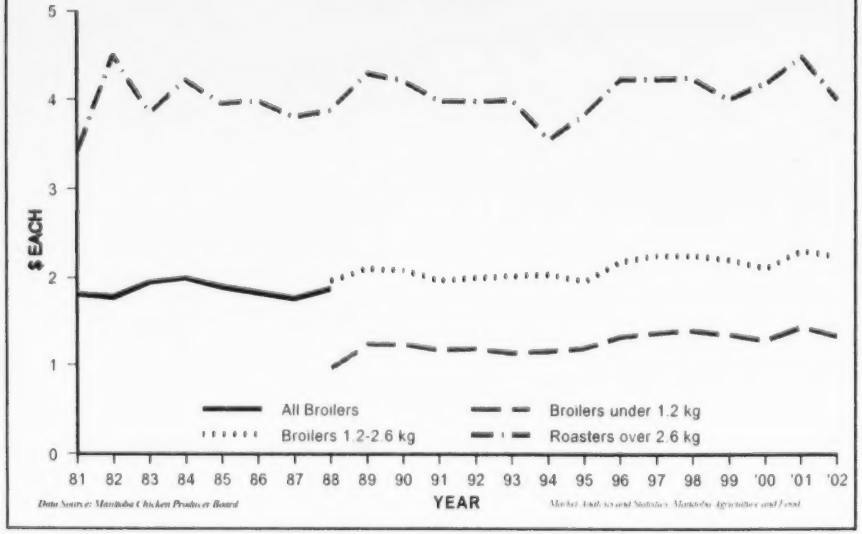
CHICKEN MEAT PRODUCTION BY PROVINCE
2002



Data Sources: Chicken Farmers of Canada

Market Analysis and Statistics, Manitoba Agriculture and Food

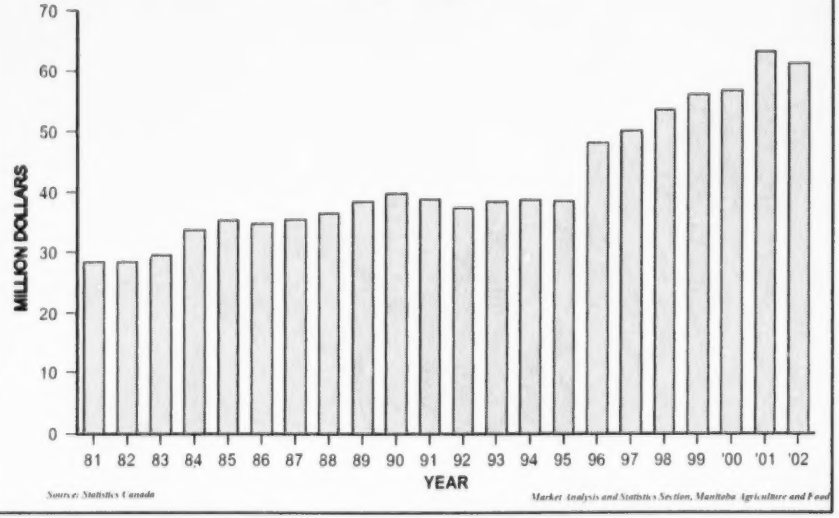
BROILER CHICKEN PRICES
1981- 2002



Data Source: Manitoba Chicken Producer Board

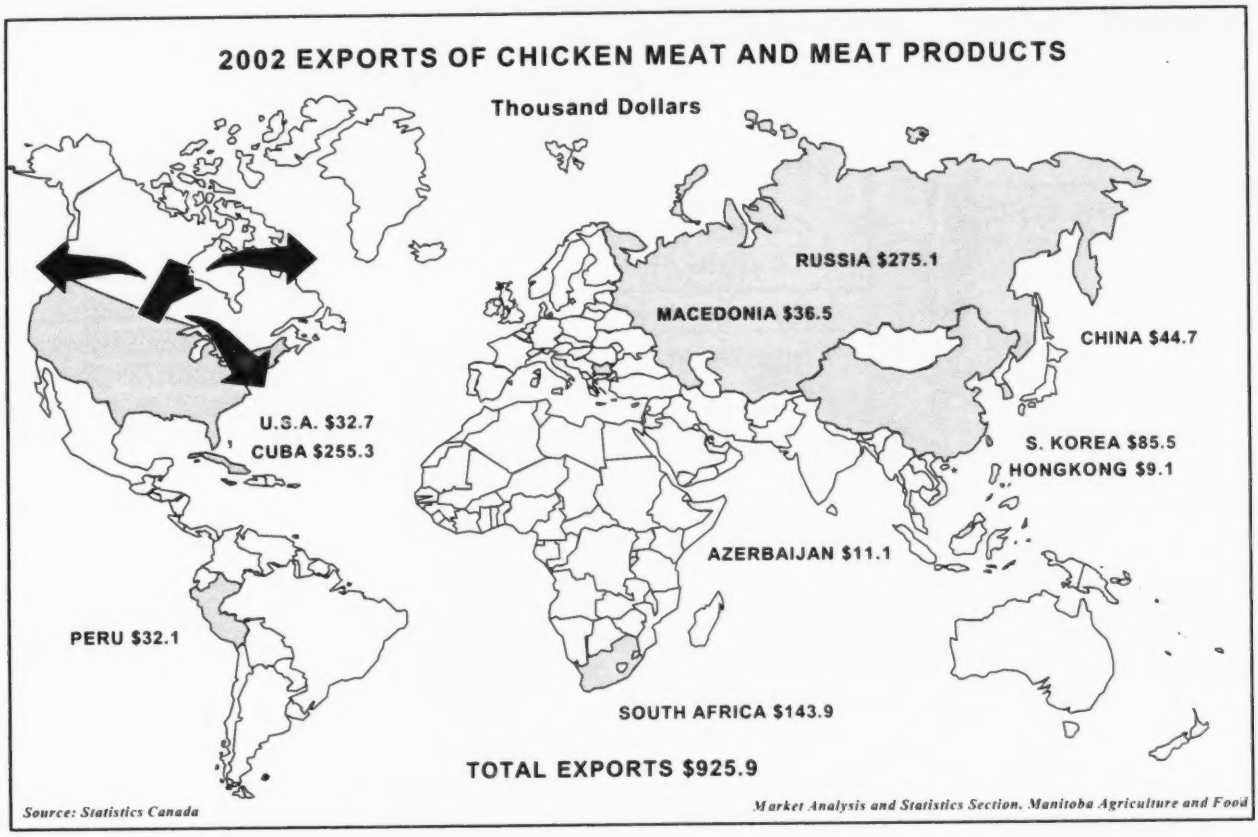
Market Analysis and Statistics, Manitoba Agriculture and Food

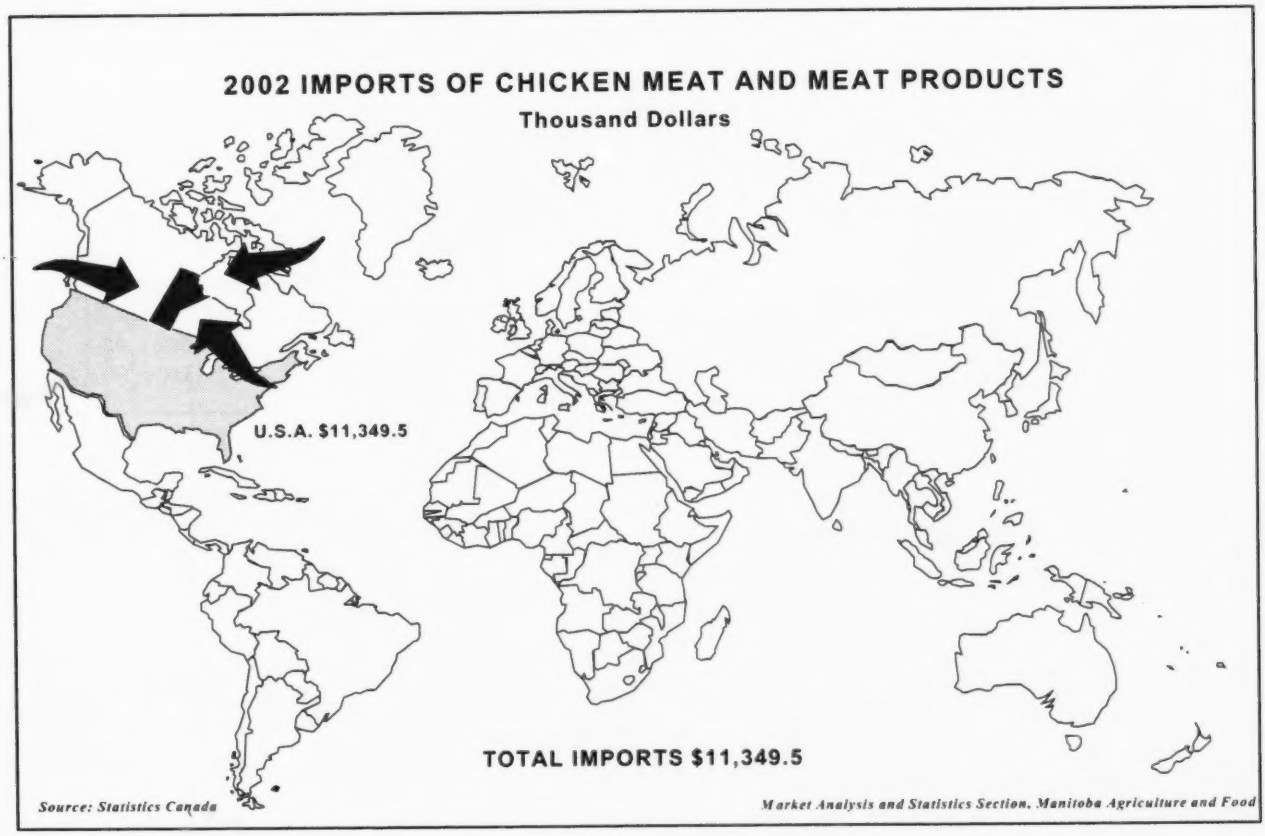
FARM CASH RECEIPTS - BROILER CHICKENS
1981- 2002



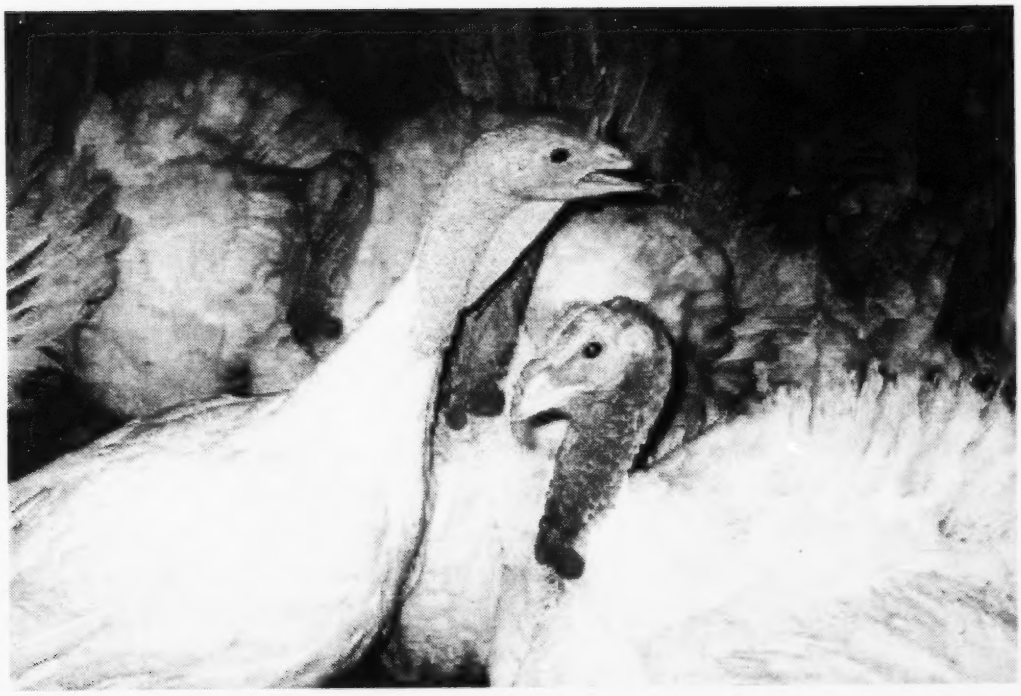
Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 EXPORTS OF CHICKEN MEAT AND MEAT PRODUCTS
Thousand Dollars
RUSSIA $275.1
MACEDONIA $36.5
CHINA $44.7
U.S.A. $32.7
CUBA $255.3
S. KOREA $85.5
HONGKONG $9.1
AZERBAIJAN $11.1
PERU $32.1
SOUTH AFRICA $143.9
TOTAL EXPORTS $925.9
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 IMPORTS OF CHICKEN MEAT AND MEAT PRODUCTS
Thousand Dollars
U.S.A. $11,349.5
TOTAL IMPORTS $11,349.5
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

TURKEY SECTOR



TURKEY SECTOR PROFILE

Production:

A major portion of turkey production occurs in south-eastern Manitoba with large concentrations along the Trans-Canada highway to Portage la Prairie and south of Teulon up to Riverton and Arborg. In 2002, 66 registered commercial producers and over 50 non-registered turkey producers had about 708,000 birds on farms in July, an increase of 2 percent from the previous year and about one-tenth of the Canadian flock. There were 8 hatchery supply breeding stock farms with 82,600 hens and one provincial hatchery, which set 9.2 million eggs and sold 7.1 million poults in 2002.

Marketings:

Turkey marketings in 2002 totalled 1.29 million birds, of which 276,000 were broilers (under 6.2 kg), 480,000 were hens (6.2-8.5 kg), 477,000 were toms (8.5-13.3 kg) and 60,000 were toms (over 13.3 kg). Turkey sales decreased by 1.3 percent from 2001 due to fewer hens being marketed. Average weights declined over the year. Total farm-gate receipts from turkey production in 2002 amounted to $17.05 million, down by 1.4 percent from 2001.

Processing:

Manitoba had one turkey slaughter and processing plant in 2002, Granny's Poultry Co-operative, Ltd., which slaughtered all registered birds marketed in the province. There was also one main secondary processor of turkey meat in 2002, Prairie Produce Inc. About 11.8 million kg of fresh and frozen turkey and turkey products, with an *estimated* value of about $35 million, were produced in 2002.

Trade:

Manitoba is involved in active trade in hatching eggs, poults and turkey meat. The trade in hatching eggs and poults is with the United States, Saskatchewan, Ontario, Quebec, British Columbia and Alberta. In 2002, there were 0.33 million Manitoba hatching eggs and 2.21 million poults sold to other provinces, while 2.31 million eggs and 0.045 million poults were brought into Manitoba from other provinces. Almost 0.23 million kg of turkey meat and processed products, valued at $1.08 million, were imported from the United States in 2002, but none has been shipped into Manitoba from Saskatchewan and Alberta for the past few years. Manitoba exported 0.95 million kg of turkey meat valued at $0.46 million to nine countries/areas, Japan, South Africa, West Africa, China/Hong Kong, Philippines, Russia, Jamaica, Cuba and Bahamas, in addition to exporting 3.17 million poults valued at $7.5 million to the United States. Manitoba imported 0.22 million hatching eggs and 0.05 million poults from the U.S. in 2002.

Potential:

Growth in Manitoba's turkey industry outside of the domestic quota system is possible by supplying additional export markets for both eviscerated and live birds. Domestic turkey consumption has been relatively stable for the past twelve years at 4-5 kg per person, but as turkey is a nutritious alternative to other meats, there is also potential to increase consumption. The winter tom bonus program provides much-needed tom turkeys during the winter months.

TURKEY SECTOR

	1999	2000	2001[R]	2002[P]	'02 as a % of '01
REGISTERED TURKEY FARMS:	70	68	67	66	99
TURKEYS ON FARMS JULY 1 ('000):	753	779	694	708	102
PROVINCIAL HATCHERIES:	1	1	1	1	100
Eggs Set (million)	5.4	7.2	9.1	9.2	101
Poults Sold (million)	4.1	5.4	6.7	7.1	106
HATCHERY SUPPLY BREEDING STOCK:					
Flocks (No.)	8	8	8	8	100
Hens ('000)	54.3	63.2	75.1	82.6	110
FARM CASH RECEIPTS ($ million):					
Turkeys	17.1	17.8	17.3	17.0	98
% of Canada	7.1	6.8	6.6	6.7	
TURKEY PRICES ($ each):					
Broilers (under 6.2kg)	7.88	8.07	8.30	8.36	101
Hens (6.2-8.5 kg)	10.76	10.85	11.08	11.07	100
Toms (8.5-13.3 kg)	17.14	17.04	17.23	17.21	100
Toms (over 13.30 kg)	-	-	-	20.40	-
TURKEY MARKETINGS ('000):					
Broilers (under 6.2 kg)	151	260	194	276	142
Hens (6.2-8.5 kg)	610	719	611	480	79
Toms (8.5-13.3 kg)	543	486	505	477	94
Toms (over 13.3 kg)	-	-	-	60	-
TURKEY PROCESSING ('000):					
Number of Processing Plants	1	1	1	1	100
Mb. Turkey Processed (million kg)	11.6	12.6	11.8	11.8	100
Est. Value of Process. Turkey ($M)	34	37	35	35	100
EXPORTS OF TURKEY MEAT/PROD:					
Turkey meat (tonnes)	813.9	403.2	611.7	950.8	155
Turkey meat ($'000)	370.7	229.6	359.8	464.1	129
Poults ($'000)	2,477.6	3,761.7	6,431.7	7,503.8	117
IMPORTS OF TURKEY MEAT/PROD:					
Turkey meat (tonnes) (from U.S.)	374.2	256.3	307.2	227.3	74
Turkey meat ($'000)	2,084.8	1,483.1	1,808.9	1,083.1	60
Poults ($'000)	163.3	334.6	37.7	110.5	293
CDN. PER CAPITA CONSUMPTION:					
Turkey (eviscerated kg)	4.2	4.3	4.1	4.1	100

TURKEY INDUSTRY CHART, 2002

HATCHERY SUPPLY
BREEDING STOCK ON FARMS
FLOCKS: 8
82,600 HENS

EXPORTS TO U.S.:
HATCHING EGGS: 0
POULTS: 3,173,000

INTERPROVINCIAL OUT:
HATCHING EGGS: 329,970
POULTS: 2,208,930

IMPORTS FROM U.S.:
HATCH. EGGS: 216,000
POULTS: 54,000

INTERPROVINCIAL IN:
HATCH. EGGS: 2,307,700
POULTS: 45,256

PROVINCIAL HATCHERY
EGG SET: 9.2 M
POULTS HATCHED: 7.1 M
POULTS PLACED: 1.7 M

ANNUAL FEED REQUIRED:
$8 million

TURKEY PRODUCTION
REGISTERED PRODUCERS: 66
POULTS PLACED: 1.7 million
MARKETINGS: 1.3 million
MARKET VALUE: $17.05 million

ANNUAL CAPITAL AND OPERATING EXPENDITURES (excluding levies):
$9.5 million

MANITOBA TURKEY PRODUCERS
- NEGOTIATES PRICE
- REGULATES QUOTA

CANADIAN TURKEY MARKETING AGENCY
- SETS GLOBAL QUOTA

MEAT EXPORTS:
0.95 million kg
$0.46 million

OTHER PROVINCES:
WHOLE, BONE-IN, BONELESS PARTS:
40-45 % of sales

1 PROCESSING PLANT
1 SECONDARY PROCESSSOR
SLAUGHTER: 1.3 million birds
MEAT WEIGHT: 11.8 million kg
EST. VALUE: $35 million

INTERPROVINCIAL IN:
SASKATCHEWAN: 0 M kg
ALBERTA: 0 M kg

IMPORTS FROM U.S.:
0.23 million kg
$1.08 million

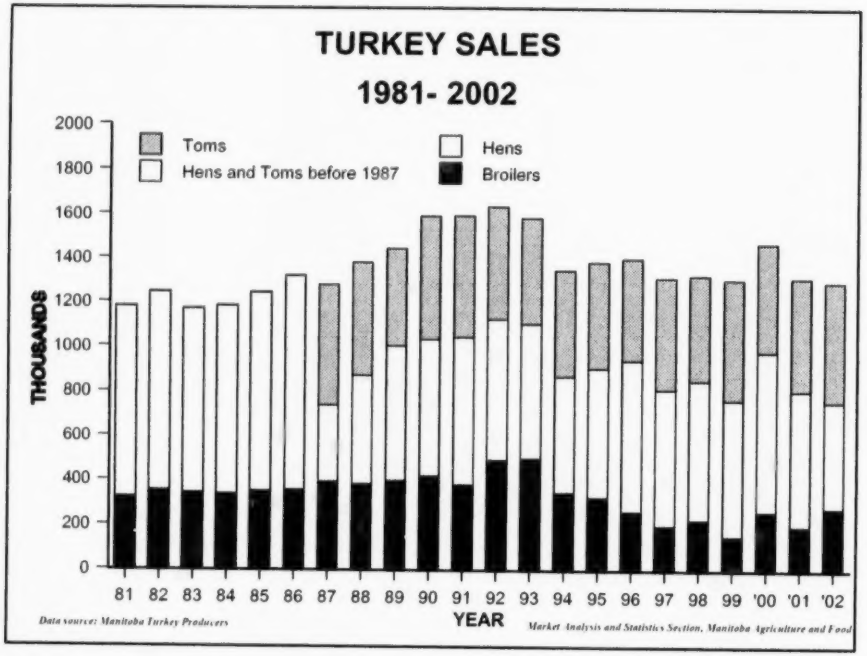
MANITOBA MARKET FRESH AND FROZEN
40 %

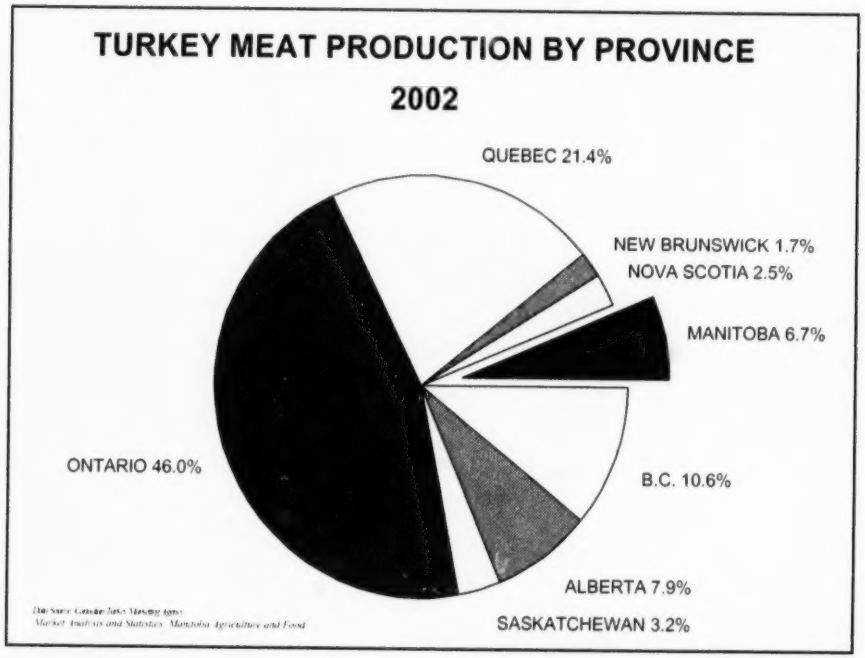
FAST FOOD & RESTAURANT

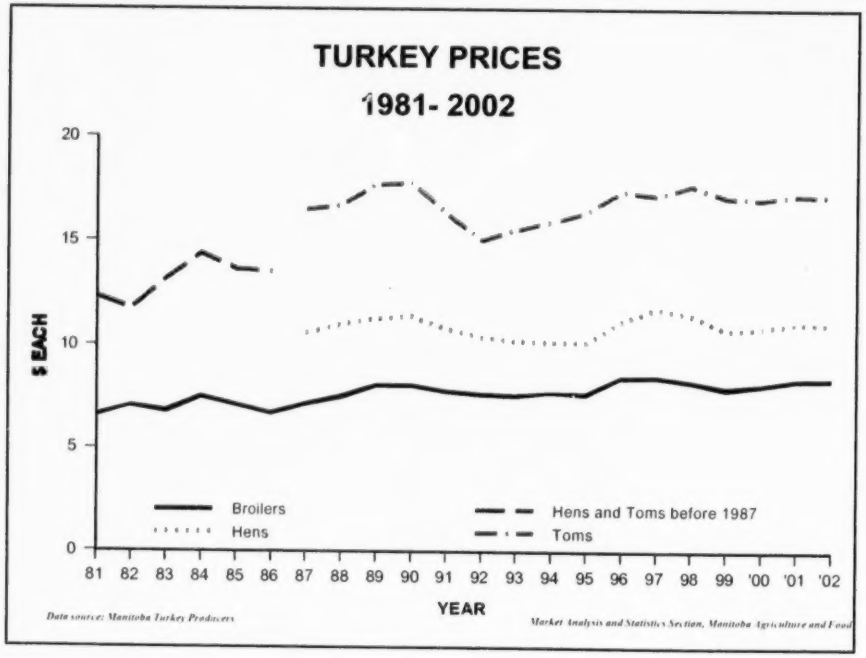
RETAIL FOOD STORES

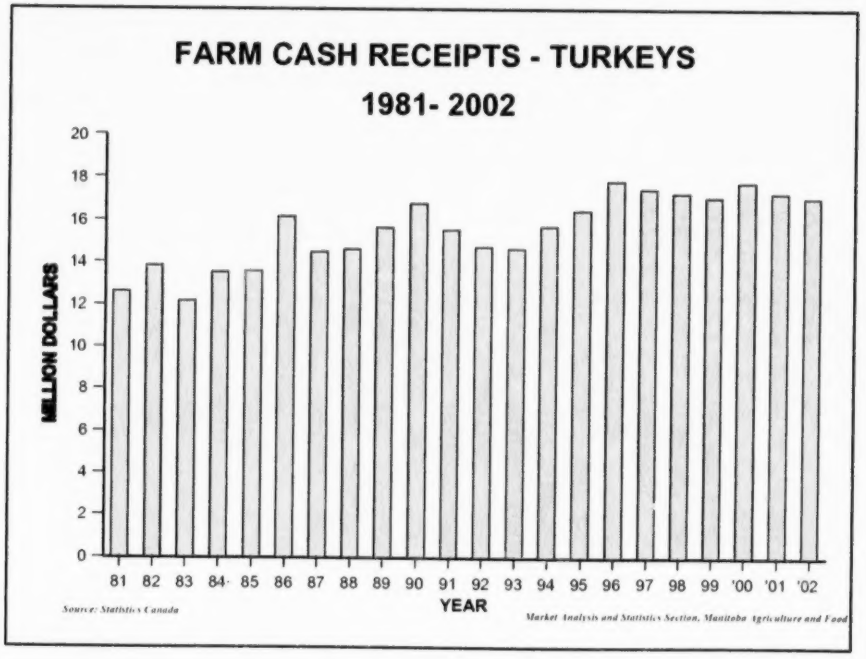
FURTHER PROCESSING

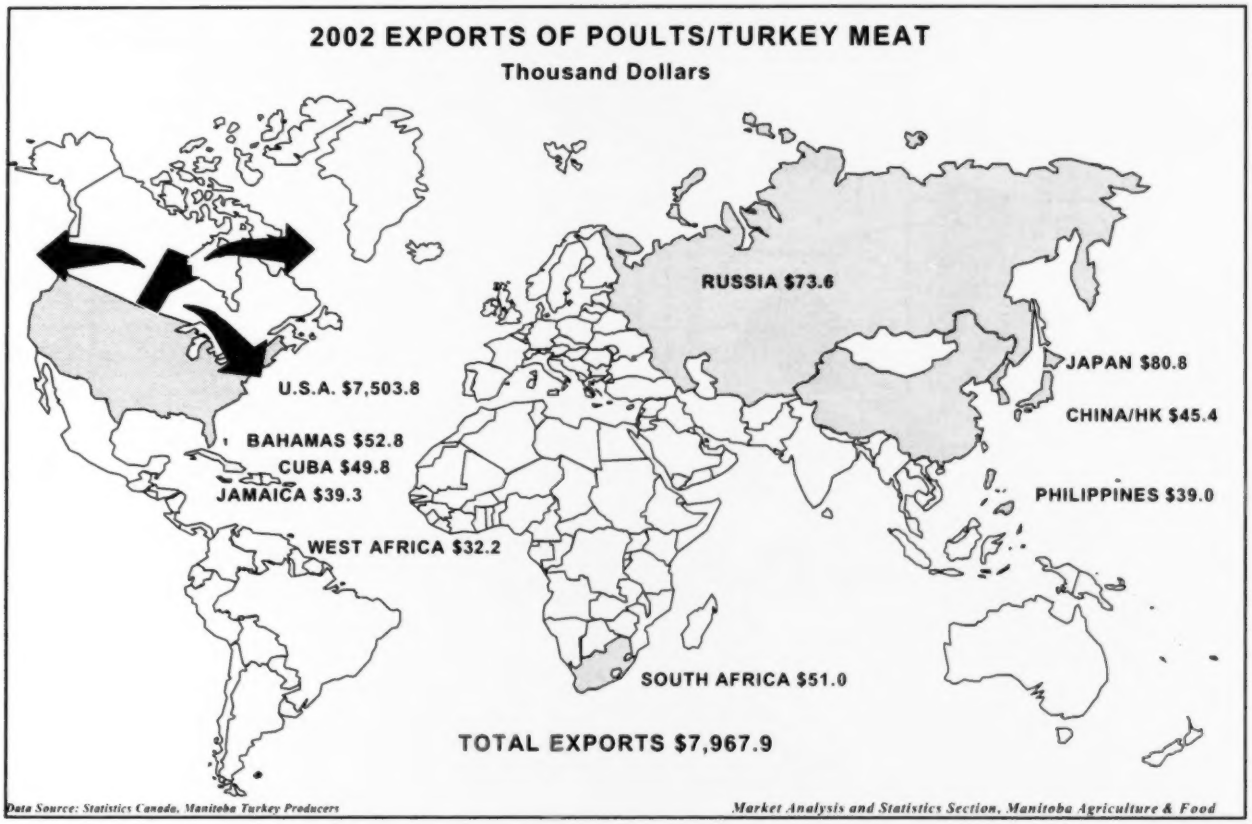
DATA SOURCE: Agriculture and Agri-Food Canada, Manitoba Turkey Producers, Statistics Canada.

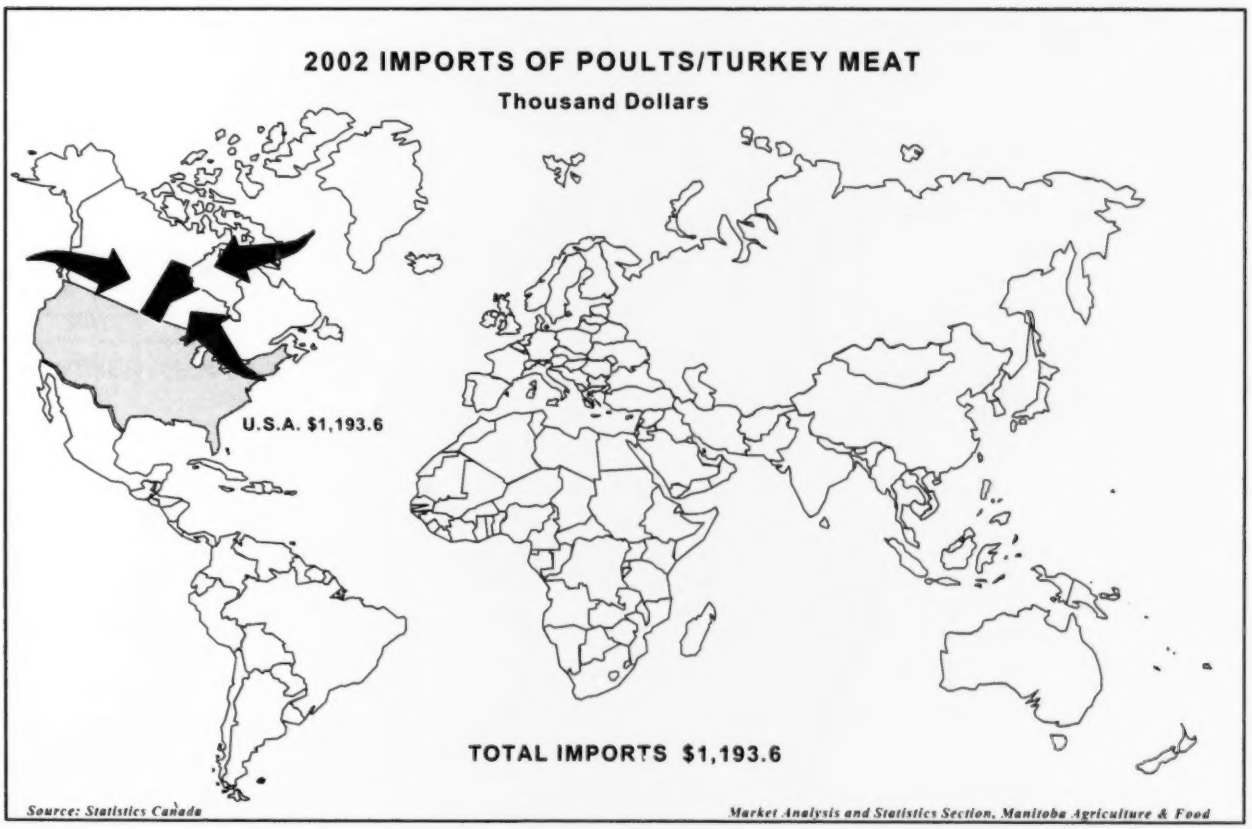

TURKEY SALES
1981- 2002
Toms
Hens and Toms before 1987
Hens
Broilers
THOUSANDS
2000
1800
1600
1400
1200
1000
800
600
400
200
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01 '02
YEAR
Data source: Manitoba Turkey Producers
Market Analysis and Statistics Section, Manitoba Agriculture and Food


TURKEY MEAT PRODUCTION BY PROVINCE
2002
QUEBEC 21.4%
NEW BRUNSWICK 1.7%
NOVA SCOTIA 2.5%
MANITOBA 6.7%
ONTARIO 46.0%
B.C. 10.6%
ALBERTA 7.9%
SASKATCHEWAN 3.2%
Market Analysis and Statistics, Manitoba Agriculture and Food


TURKEY PRICES
1981- 2002
$ EACH
20
15
10
5
0
Broilers
Hens
Hens and Toms before 1987
Toms
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01 '02
YEAR
Data source: Manitoba Turkey Producers
Market Analysis and Statistics Section, Manitoba Agriculture and Food


FARM CASH RECEIPTS - TURKEYS
1981- 2002
MILLION DOLLARS
20
18
16
14
12
10
8
6
4
2
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01 '02
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2002 EXPORTS OF POULTS/TURKEY MEAT
Thousand Dollars
RUSSIA $73.6
JAPAN $80.8
CHINA/HK $45.4
U.S.A. $7,503.8
BAHAMAS $52.8
CUBA $49.8
JAMAICA $39.3
PHILIPPINES $39.0
WEST AFRICA $32.2
SOUTH AFRICA $51.0
TOTAL EXPORTS $7,967.9
Data Source: Statistics Canada, Manitoba Turkey Producers
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2002 IMPORTS OF POULTS/TURKEY MEAT
Thousand Dollars
U.S.A. $1,193.6
TOTAL IMPORTS $1,193.6
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food